

Conference Planning Checklist

Where

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At times you will need to get away from home base to avoid interruptions and to help develop team work.

- ✓ Select a location which offers good common carrier services if participants are to come from some distance.
 - Is the location close to where most participants work?
 - Are Government contract transportation rates available?
 - Are direct flights available to the airport near the conference site?
 - Consider local travel availability.
 - Is limousine and/or taxi service available?
 - Are rental cars required? Can they be shared?
- ✓ Pick a conference facility.
 - Use Government-owned or Government-leased conference facilities to the maximum extent possible. The Mine Safety and Health Academy in Beckley, West Virginia is excellent and is occasionally available to agencies other than MSHA.
 - Avoid sites that may appear extravagant to the public.
 - Check carefully to see in which county or municipality potential facilities are located. Mailing addresses are not always a true indicator of the actual location of a facility.
 - Compare proposed lodging rates with the reimbursement rate authorized by GSA for that location.
 - Actual lodging expenses should not be requested or authorized for conferences scheduled and/or controlled by DOL.

- Make sure meeting room charges are reasonable. Per diem is intended to reimburse the participant's individual subsistence expenses. Conference administrative costs, including those for conference facilities, are not to be included as part of the participant's subsistence reimbursement.
- Confirm that the facility selected meets the fire prevention and control guidelines contained in 15 U.S.C. § 2225a.

How to Pay

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Decide whether to contract for lodging, and all meals, some meals or no meals, having participants pay for non-contracted items directly.

- ✓ When lodging or any meals are furnished at no cost or at a nominal cost to employees, the applicable maximum per diem rate is reduced to a daily amount commensurate with the expenses expected to be incurred by the employee.
- ✓ Costs for lodging and food provided under contract or purchase order combined with the per diem to be paid the employee cannot exceed the maximum per diem rate for location.
- ✓ To avoid problems and gain valuable advice about various vendors, see your procurement officer or purchasing agent early.
- ✓ Competitive procedures must be used and award made to the offeror, with the lowest quoted price, meeting your requirements. For actions over \$2,500, verbal quotations from three separate vendors are needed. Quoted price information should accompany your requisition.
- ✓ Conferences involving more than 30 employees must be approved by the agency Administrative Officer.
- ✓ If a proposed action is over \$25,000 the desired services are to be obtained by issuing a formal contract. Your Procurement Office is responsible for providing the necessary guidance and assistance to effect contract award.
- ✓ The Federal Government is not subject to state or local lodging or sales taxes when lodging is obtained by purchase order or contract. However, employees purchasing lodging directly are subject to state taxes except in a few jurisdictions identified in OAG's monthly *Official Traveler*. (For OAG subscription information or questions call 1-800-342-5624.

- ✓ Direct procurement by the Government of lodging facilities in the District of Columbia is prohibited by law.

Meals

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Meals may be paid for a participant under the following conditions:

- ✓ When the participant is in travel status defined as an assignment of more than 12 hours and the location of which is both more than a 25 mile radius from the actual location of the employee's official duty station, and more than a 40 mile radius from the employee's commuting residence. Deductions must be made for any contracted meals from any per diem reimbursements due the employee so that the Government does not pay twice for the same service.
- ✓ When the employee is not in travel status, meals may be permitted, if the conference is training as defined in 5 U.S.C. § 4101 and the meals are incidental to the meeting; attendance at the meals is necessary for full participation, and the employees are not free to take meals elsewhere without missing essential formal discussions, lectures, or speeches concerning the purpose of the meeting.

Hotels and conference facilities may include the provision of light refreshments (e.g. coffee) during breaks without additional charge. If they are part of the facility's normal arrangements for the conference room they be accepted. However, when this is to take place there must be a specific statement to that effect in the Department's procurement instrument (contract/purchase order) or in an attached vendor's proposal which sets forth what refreshment items are to be provided without charge.

Lodging/Meeting Rooms

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Lodging and meeting room guidelines provide:

- ✓ Sleeping accommodations may be arranged/procured for those employees in travel status as defined in 3 above, except in the District of Columbia as noted in 2 above. Absent specific legislative authority, sleeping accommodations may not be provided to individuals not in travel status.
- ✓ Conference rooms and meeting facilities may be procured for short-term conferences.
- ✓ Any conference room fee must be billed directly to the Government rather than being included as part of the lodging fee to be paid by the participant.

Special Services

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Most conferences will involve the Government paying for at least some special supporting services.

- ✓ The overall cost of supporting services, such as audio-visual equipment and court reporting, should be considered in the selection of the conference site.
- ✓ The general rule is that refreshments at breaks cannot be paid by the Government; however, refreshments may be provided at activities being conducted under the Government Employees Training Act when keeping participants together during breaks for further discussion of the topics presented is part of the training program design.

Travel Authorizations

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Because of the unique nature of conferences, specific trip travel authorizations are usually required. Individual blanket authorizations should not be used to perform conference travel as described here.

Paying the Bills

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The event isn't over for the conference planner until the bills from the facilities are paid and the vouchers from the participants are processed.

- ✓ Invoices from the facility must be reviewed to assure that:
 - The services being billed were actually provided;
 - The rates charged are the same as agreed to in advance; and
 - No personal charges of participants are included.
- ✓ When a participant submits a voucher claiming reimbursement for expenses at a conference where some meals and/or lodging have been under contract:
 - A copy of contract must be provided to the voucher examiner/certifying officer, and
 - The minimum per diem of \$2 to cover the participant's

incidental expenses should be recognized.

Services of Travel Management Centers

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A Travel Management Center (TMC) is a commercial travel office operated by a travel agent under contract with the General Services Administration (GSA). Under terms of its contract with GSA, a TMC agrees to provide a full range of services to assist Federal travelers and agencies including arranging conferences and seminars. Conferences planners should take advantage of this expertise.

Additional Information

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For more detailed guidance, please refer to Department of Labor Manual Series (DLMS), Vol. 7, which covers travel and transportation.